Third Party Administrator (Representative/Provider) access to *UI eServices for Employers*

The Montana UI Contributions Bureau is on schedule to go live with their new *UI eServices for Employers* on February 24, 2014. Through eServices, employers will be able to file and pay their UI Quarterly Reports, update demographic information, and much more. Third Party Administrator's (TPA) may also gain access to their clients UI Tax Accounts, <u>if we obtain authorization from each client</u>.

UI eServices for Employers will have several levels of access:

- View Only
  - View reports, payments, and limited demographic information.
- Pay Only
  - View reports, payments, and limited demographic information. Plus the ability to make ACH Debit or Credit Card Payments and/or print payment vouchers.
- File Only
  - View reports, payments, and limited demographic information. Plus the ability to file and print quarterly UI reports.
- File & Pay
  - View reports, payments, and limited demographic information. Plus the ability to both file and pay quarterly UI reports.
- Full Access – Includes the authority to update demographics (including owner/officer information), view correspondence (including benefit charge notices), and submit a variety of requests (such as appeals, payment plans, and more). Requires the employer (client) to expressly grant access to the TPA via eServices.
- Fiscal Rate Exchange – Does not give direct access to any client account information, simply allows the user to upload a client list and retrieve UI Tax rates for each client. Does require a MOU agreement to be in place. See the Fiscal Rate Exchange documentation at http://uid.dli.mt.gov/tax/eservice/NewFiscalRateExchangeSpecs.pdf for more information.
- Bulk Filing – Does not give direct access to any client account information, simply allows the user to utilize eServices to upload your ICESA or FSET file if you do not wish to use any of the other methods provided. Please see our Montana UI Contributions eFiling Handbook at http://uid.dli.mt.gov/tax/eservice/Montana%20UI%20Contributions%20eFiling%20Handbook.pdf for more information regarding the transmission options available. In order to discuss any issues that may occur with specific records submitted via a bulk file, it is preferred that we have a MOU in place with all bulk filers.

For all TPAs who are currently "transmitters" in our online WOW system, in order for us to set up File & Pay access in *UI eServices for Employers* for you, we must have a signed authorization form on file for each of your clients. To expedite this process, authorization forms can be mailed, faxed, or securely emailed through the FTP Secure File Transfer Service in bulk to:

- **Mail:**
  Attention: April Rose
  UI Contributions Bureau
  PO Box 6339
  Helena MT 59604-6339

- **Fax:**
  Attention: April Rose
  (406) 444-0629

- **FTP Secure File Transfer Service:**

  - To send an FTP Secure File Transfer, a valid ePass account must be established. This can be done by going to this website: https://transfer.mt.gov/ and either creating a new account or logging into an existing ePass account.
  - Once you are logged in, click on the 'Send a new file or files' link.
  - Press the 'Browse' button and select the file that needs to be sent.
  - Press the '+Add to File List' button.
  - This will add the file to the box and show the upload status. Once the upload status shows the file has been uploaded, click on the 'Continue' button.
  - Click on the 'State Employee, ePass Customer or Previous Recipients' link.
  - Under State Employee, enter arose@mt.gov to send the file.
  - Click the '+Add To Recipient List' and one of these names should show in the 'Selected Recipient List'.
  - In the box marked 'Enter a Message for the Recipient', enter a **contact name**, a **contact phone number**, and a **valid e-mail** address so we can send a response back concerning receipt of the file.
  - Press the 'Send' button. This will send the file.

  NOTE: ePass and the Secure File Transfer Service offered by ePass is not a system supported by the Department of Labor and Industry, it is a service offered by the State of Montana. If you have any issues using this system (i.e. cannot remember login/password information, cannot register, system doesn't seem to be working properly) please call the ePass Support Center at (406) 449-3468 or go to this website https://app.mt.gov/contactus/index.html .

Once the authorization forms are received we will work with you to set up an eServices account (may require you to be established as a customer if your organization does not already conduct business in Montana) and then we'll attach all of your clients for you. Alternatively, once a TPA has their account established, they can individually request access to each of their clients though *UI eServices for Employers*. The request will require you to upload (attach) a signed authorization form with witness signature.

More about the authorization forms.

In an attempt to make this process a little smoother, we are agreeable to using authorization forms that your clients have already signed for you in the past (instead of requiring new forms be signed) provided that the authorization form you used meets the following:

- Somewhere on the signed form it must stipulate, at a minimum, your organization is authorized to conduct business in regards to STATE taxes on behalf of the client. Ideally, we would like it to directly specify UI taxes, but that is not required at this time.

If your form does not meet the above standard, you may update your form or utilize the MT UI Contributions Authorization form found here:

http://uid.dli.mt.gov/tax/eservice/MTUIContributionsAuthorizationForm.pdf

Fiscal Rate Exchange & Bulk Filing

Due to the limited amount of information returned to participants in the Fiscal Rate Exchange, signed authorization forms from each client will not be required. However, we will require your organization to enter into a Memorandum of Understanding (MOU) with the UI Contributions Bureau, confirming you do have the authority to retrieve the rate for your clients.

If TPA's participating in the Fiscal Rate Exchange & Bulk Filing options, wish to receive additional access to their clients information, they must submit a signed authorization form for said client(s).

For more information on the Fiscal Rate Exchange:
http://uid.dli.mt.gov/tax/eservice/NewFiscalRateExchangeSpecs.pdf

Questions?

Please contact Corena Benjamin at cbenjamin@mt.gov or via phone at 406-444-0690 or April Rose at arose@mt.gov or via phone at 406-444-6963.